



PDF MARKUP TOOL SETUP GUIDE

Version 2.0 – Hosted App – August 4th 2021

Version installed:- 1.0.0.34

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1. Introduction

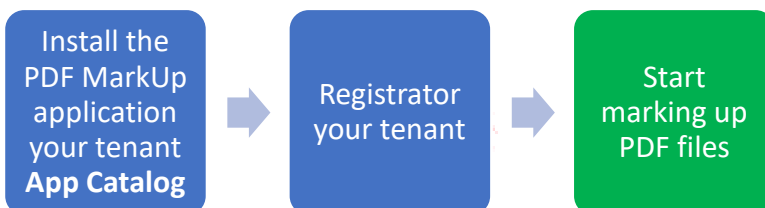
This document outlines the required steps to install and configure the PDFMarkUp Tool to your O365 tenant.

Firstly, thank you for downloading the installation guide. This is SoHo's first product launch and we are totally committed that you are totally satisfied with this product. If you have a question or query, please feel to call me.

Peter Ward

Peter Ward – 862 220 6080 | CTO- SoHo Dragon

TO REDUCE OUR HELPDESK SUPPORT INQUIRES WE HAVE REALLY,
REALLY SIMPLIFIED THE INSTRUCTION PROCESS STEPS



1.1 Read these knowledgebase links for the fundamentals

<https://pdfkbase.sohodragon.nyc/index.php/article-categories/installation/>

<https://pdfkbase.sohodragon.nyc/index.php/article-categories/faqs/>

<https://pdfkbase.sohodragon.nyc/index.php/article-categories/deployment/>



2.0 Let Get Started - Basics

STEPS:

START

Confirm that you have the right permissions to your O365 tenant

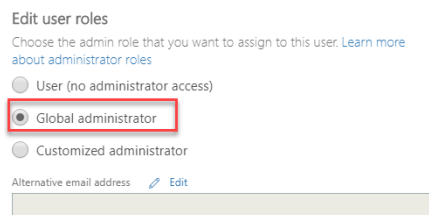
1. Goto your SharePoint admin center page

<https://admin.microsoft.com>

To confirm this, sign in to <https://admin.microsoft.com> as a global or SharePoint admin. (If you see a message that you don't have permission to access the page, you don't have Office 365 administrator permissions in your organization). Please speak to IT.

This will need to be set.

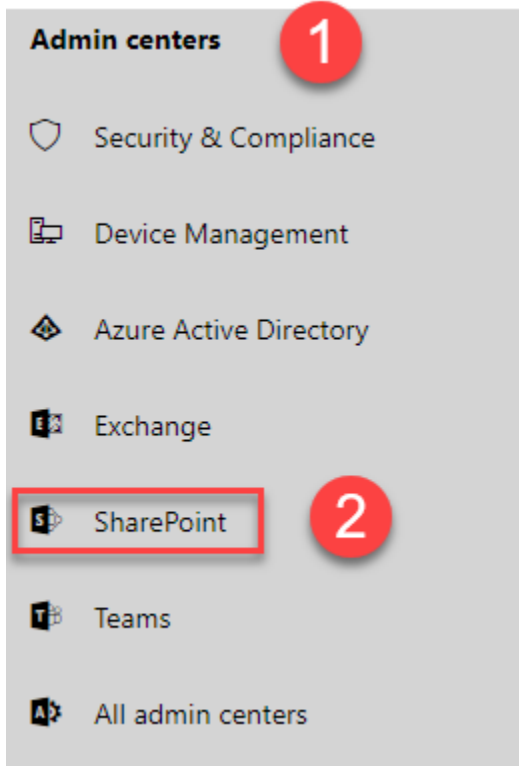
YOU WILL NEED "GLOBAL ADMINISTRATOR" LEVEL PERMISSION TO ACCESS OR CREATE AN APP CATALOG SITE



2. Check the App Catalog exists

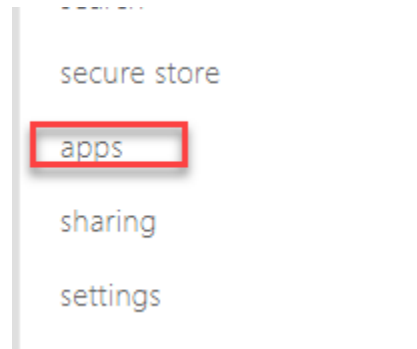
Goto:

<https://admin.microsoft.com/Adminportal/Home#/homepage>

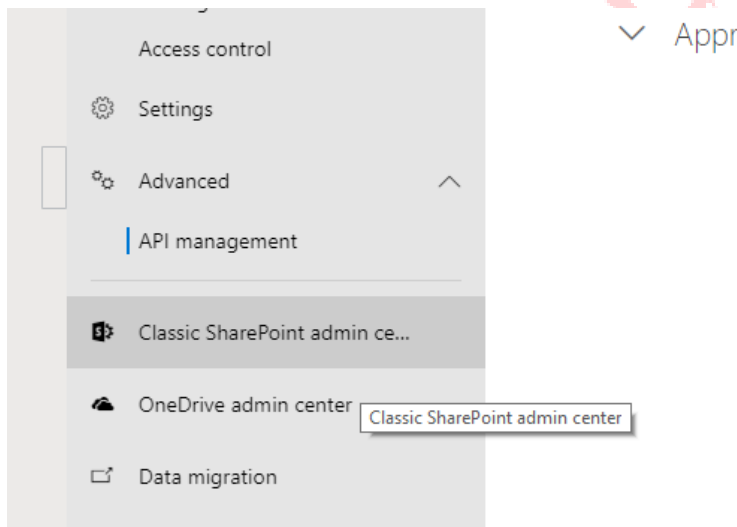


3. If you have access, click in the **SharePoint** link on the left-hand side.
4. Confirm if you have an App Catalog set up in your O365 environment.

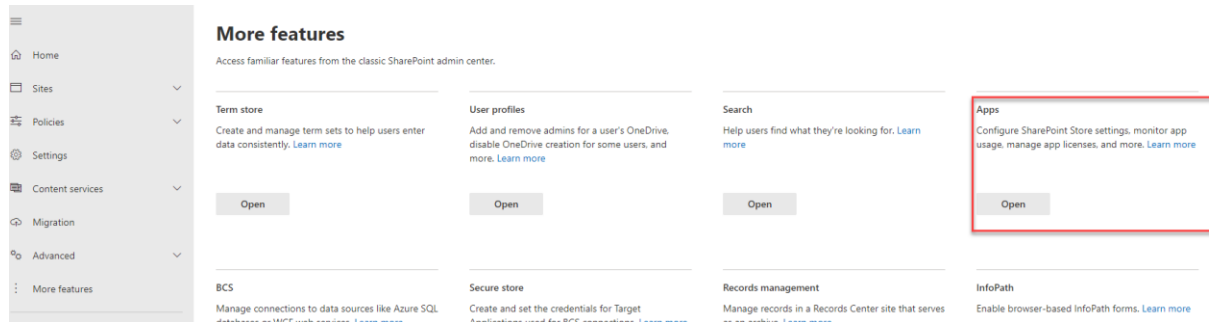
If you don't see the above screenshot to the left, click on 'Classic Sharepoint admin Center' and then you will be able to see the above



screen



5. Click on the **Apps** link on the left menu



apps

App Catalog exist

App Catalog

Make apps available to your organization and manage requests for apps. An app catalog is required to disable Store purchases for end users.

Purchase Apps

Purchase apps from the SharePoint Store.

Manage Licenses

Manage licenses for apps purchased from the SharePoint Store.

Configure Store Settings

Manage app acquisition settings including turning off purchases for end users in the SharePoint Store.

If the screen is like the figure above. The **App Catalog** exists

If the screen displays this message. The App Catalog needs to be created.

App Catalog Site

The app catalog site contains catalogs for apps for SharePoint and Office. Use this site to make apps available to end users.

There is no app catalog site created for your tenant.

- Create a new app catalog site
- Enter a URL for an existing app catalog site



Follow the steps in this link: <https://docs.microsoft.com/en-us/sharepoint/use-app-catalog> to create the App Catalog for your tenant.

END - The App Catalog is installed in your O365 tenant environment

3.0 Installing the App in your O365 tenant

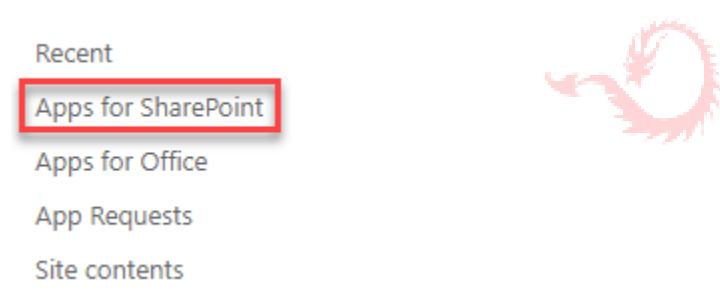
THIS IS BOTH SHAREPOINT AND TEAMS

STEPS:

START

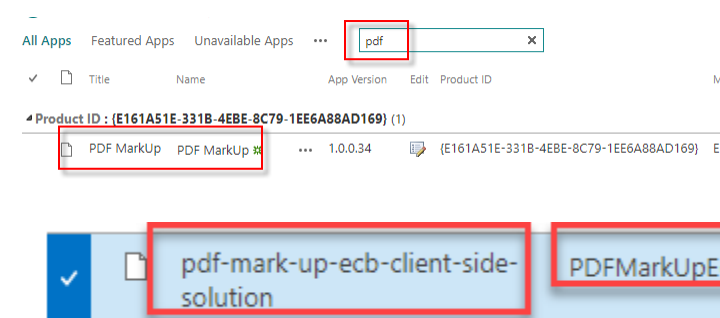
NOTE: You will need to be an Administrator to install the app

1. Click on **Apps for SharePoint**. To confirm if the PDFMarkUp app is in the catalog



2. Search the word "PDF".

If this file is displayed, then the App is already deployed. If this is the latest version, then skip the next step.



3. If the file doesn't exist, download this file [PDFMarkUpEditor](#) to your desktop and upload to your tenant Apps for SharePoint

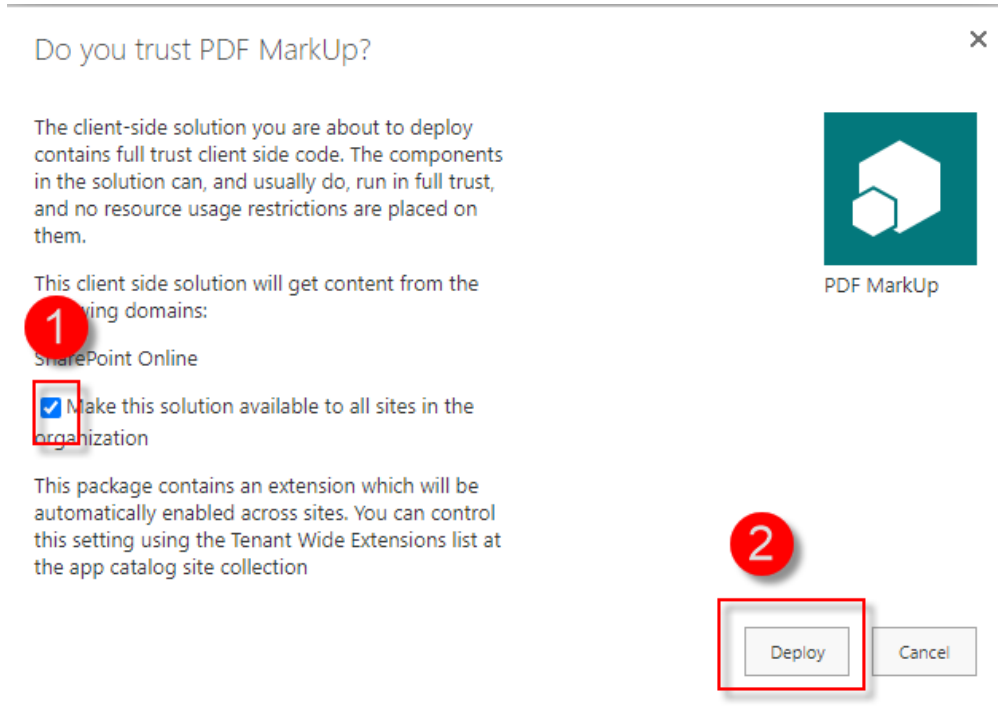
<https://<Tenant>.sharepoint.com/sites/appcatalog/AppCatalog/Forms/AllItems.aspx>





THIS MAY TAKE A FEW MINUTES

4. Select the check box to indicate that the solution can be deployed automatically across all sites in the organization.



5. Select **Deploy**

At this point, the app has been deployed, but could take 20 minutes for a tenant wide deployment to be functionality enabled.

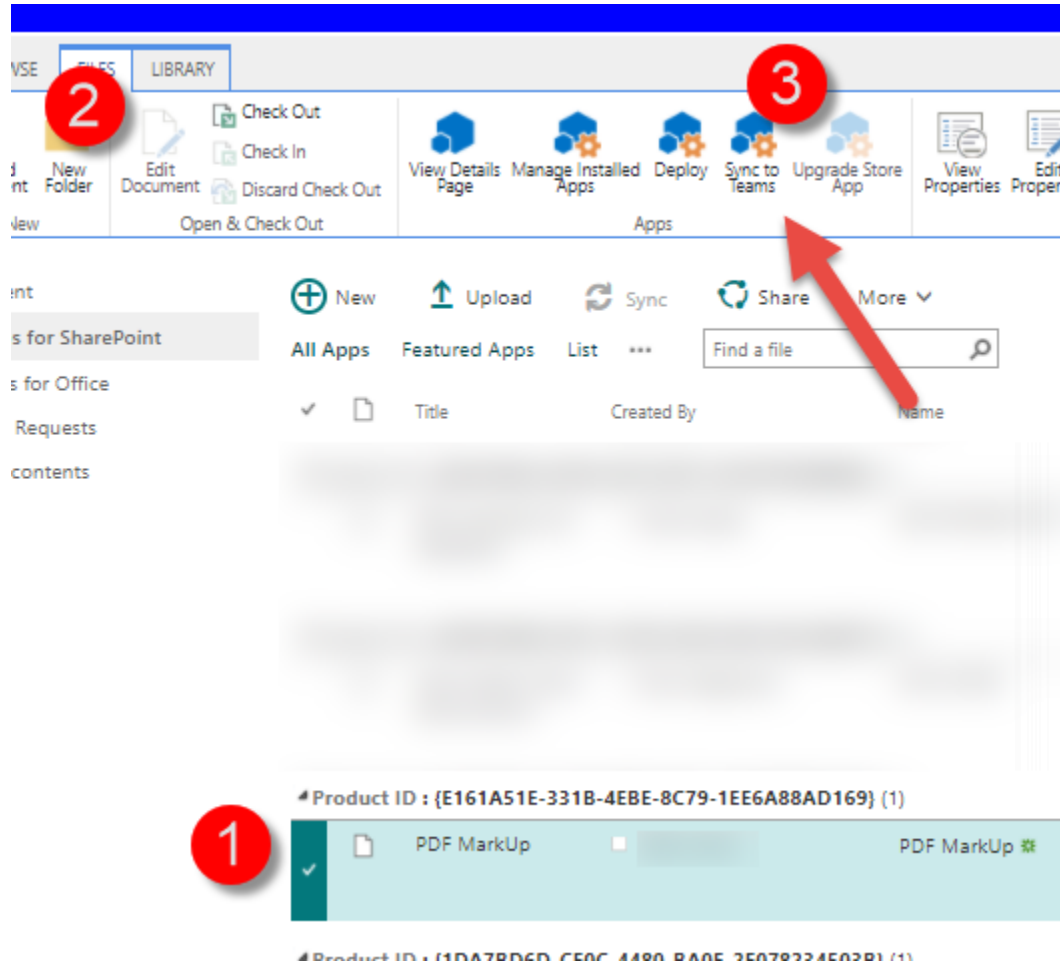
Please refer below link for more information

<https://docs.microsoft.com/en-us/sharepoint/dev/spfx/extensions/basics/tenant-wide-deployment-extensions>

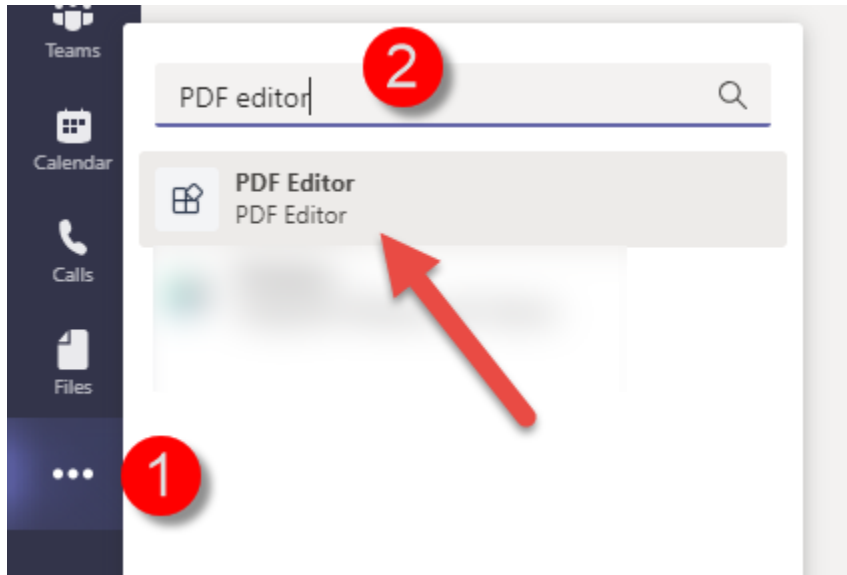
6. Sync the App to Teams

NOTE: You will need to be paying for a Teams subscription for this to work in Teams

Click **Sync** to Teams



7. Add the **App** to Teams



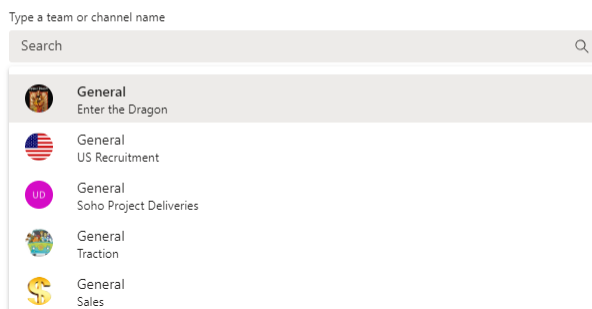
On the left side bar of Teams, search on the PDF editor and select it

8. **Add to a Teams**

9. **Add to The Team, Channel**

Select a channel to start using PDF Editor

PDF Editor will be available for the entire team, but you can start using it in the channel you choose.



10. Click **Set up a Tab**

11. Click **Save**



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All PDF files in the Channel will be displayed.

END- The PDFMarkUp Tool App is installed and deployed to your tenant



4.0 Configuration of the App to your O365 tenant

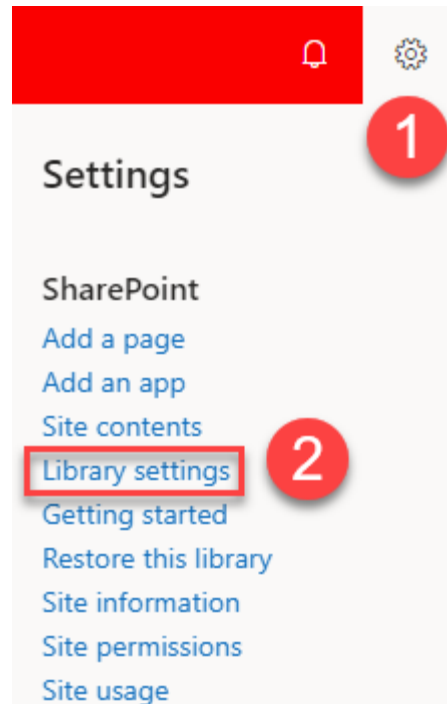
START - By design, the PDF Editor has been pushed to all current and future site collections in this tenant.

IF YOUR DOCUMENT LIBRARY IS MODERN, THEN NO FURTHER ACTION IS REQUIRED.

Classic Only

If there is a library that is classic, then the following steps need to be done on each library.

1. Select the wheel on the top right-hand corner
2. Select Library setting
3. Select Advanced Setting
4. Select New experience and Click Ok

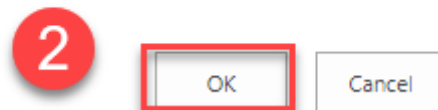


List experience

Select the experience you want to use for this list. The new experience is faster, has more features, and works better across different devices.

Display this list using the new or classic experience?

- Default experience set by my administrator
- New experience
- Classic experience



NOTE: If there are web parts on the page of the document library, these need to be removed.

END



5. Register the PDF MarkUp Tool to a subscription

Watch this video

<https://pdfkbase.sohodragon.nyc/index.php/knowledge-base/registering-your-tenant-to-your-subscription/>

6. Managing Users

<https://pdfkbase.sohodragon.nyc/index.php/knowledge-base/managing-users-and-subscription/>

7. Approve MS Graph Permissions [for OneDrive]

Open up the SharePoint admin portal - <https://{your domain}-admin.sharepoint.com/>

Expand the 'Advanced' Tab and click API access

Expand Organization-wide and look for PDF MarkUp - [Files.ReadWrite.All & Sites.ReadWrite.All]





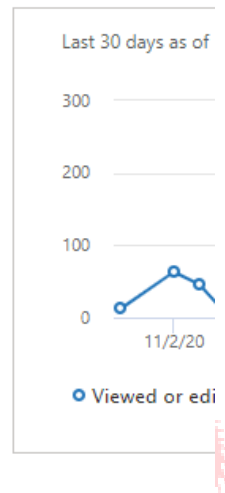
Click on one at a time, then click Approve

SharePoint admin center

- Home
- Sites
- Policies
- Settings
- Content services
- Migration
- Advanced
- API access**
- More features
- OneDrive admin center
- Customize navigation

SharePoint

SharePoint file



Message center

- 11/30/20
- 11/24/20
- 11/24/20



SharePoint admin center

API access

Manage access to Azure AD-secured APIs from SharePoint Framework components and scripts. [Learn about managing permission requests](#)

Approve Reject

API name	Package	Permission	Last requested
Pending requests (6)			
Organization-wide (6)			
Microsoft Graph	dominion-sph-searchparts-client-side-solution	User.ReadBasic.All	8/14/2020
Microsoft Graph	Office 365 Group Log	Group.ReadWrite.All	8/26/2020
Microsoft Graph	soho-charterdesk-client-side-solution	Mail.Send	10/22/2020
Microsoft Graph	soho-charterdesk-client-side-solution	Calendars.ReadWrite	10/22/2020
Microsoft Graph	PDF MarkUp	Files.ReadWrite.All	10/31/2020
Microsoft Graph	PDF MarkUp	Sites.ReadWrite.All	10/31/2020
Approved requests (1)			
Organization-wide (1)			
Microsoft Graph	-	OnlineMeetings.ReadWrite	-

1

2

Need help? Feedback

<https://pdfkbase.sohodragon.nyc/index.php/article-categories/deployment/>



END- The PDFMarkUp Tool Now has access to connect to your Sites and OneDrive files